

MTAC User Group 4

**Weekly Meeting for
July 22, 2015**

- 1. Informed Visibility™ (IV™) – Development & Requirements, continued**
- 2. Updated UG4 Charter**
- 3. Any Other Business (AOB)**

Informed Visibility™ for Mailers

☐ **Housekeeping**

- Recap from Previous Meeting
- Future Topics and Getbacks
- Action Items

☐ **Complete Previous Meeting's Topics**

☐ **Implementation Gaps IV can help fill**

Housekeeping

**Informed Visibility
for Mailers**

- ❑ Housekeeping (Meeting Recap, Future Topics, Actions)
- ❑ Mailer/mailing Dashboard
- ❑ Troubleshooting and Data Quality
- ❑ Education and Documentation
- ❑ Prioritization of File Formats
- ❑ Mail Tracking Data Fields (will continue discussion on 7/22)
 - Piece Level Data Attributes

See appendix for slides from last meeting

1. Prioritization of File Formats (done 7/1) and Data Fields
2. Data Access Management and Data Delegation
3. How Company Permissions will work in IV
4. IV Source Systems and Data Timeliness
5. Logical Delivery Event and ZIP+4 scenarios
6. IV Implementation Timeline
7. Getting Started with IV and Onboarding Simplification
8. Communications and Education - Getting the word out
9. UG to brainstorm list of information gaps IV can fill, such as IMb Planning Tool ***NEW***

	Action Item	Established on:	Assigned to:
1	Research Logical Delivery Event and ZIP+4 scenarios (PO Boxes, cluster boxes, high rises), in order to present back to UG4.	June 24, 2015	Amy Cradic
2	Create slide showing how AMS address rolls up to primary address for Logical Delivery Events.	June 24, 2015	Amy Cradic
3	Reach out to Shawn Baldwin (via Himesh) to discuss change request process and lead time for Mail.XML.	June 24, 2015	Amy Cradic
4	Research latency associated with all IV source systems providing handling event data.	June 24, 2015	Amy Cradic
5	Discuss suggestion to provide data access to shippers with Steve Dearing and Himesh, based on Scheduler ID CRID.	June 24, 2015	Amy Cradic
6	Create matrix showing Data Access Management and Data Delegation rights (as is).	June 24, 2015	Amy Cradic

	Action Item	Established on:	Assigned to:
7	Add action items to MTAC User Group 4 action item Excel tracker.	July 1, 2015	Himesh Patel
8	Show mockup of Mailer/Mailing Dashboard at future MTAC UG4 meeting.	July 1, 2015	Amy Cradic
9	Provide listing of delimiters that will be available for delimited files.	July 1, 2015	Amy Cradic

Continuation of Previous Meeting's Topics

**Informed Visibility
for Mailers**

Mail Tracking Data Fields

**Informed Visibility
for Mailers**

Discussion Points

- ❑ **Discuss desired Data Elements (Piece, Bundle, Handling Unit, Container)**
 - See next slide for piece-level data attributes discussed previously in UG4
 - What elements are desired for bundles, handling units, and containers?
- ❑ **Support as-is data provisioning formats**
- ❑ **Identify and prioritize other available attributes**
- ❑ **Need to consider file size**, e.g. providing option to use 1-letter code to represent Handling Event Type: Actual (A), Assumed (S), Logical (L)
- ❑ **Normalizing handling event nomenclature, regardless of the source system**, e.g. Operation Codes vs. Event Types
- ❑ **Other considerations?**

Piece Level Data Attributes (previously reviewed at UG4)

Facility ID (ZIP)	Operation Code	Scan Date & Time	Routing Code	Tracking Code
22081	896	10/03/2010 11:20:50	57401317223	00040012345990019102
22081	896	10/03/2010 11:20:51	57401246401	00040012345990019101
22081	896	10/03/2010 11:20:53	57446009797	00040012345990019103

Currently provisioned to IMb Tracing

- TimeStamp (mm-dd-yyyy hh:mm:ss)
- Facility ZIP (5-digit ZIP)
- Operation Number (3-digit operation number)
- TrackingCode (20-digit number)
- RoutingCode(0, 5, 9, or 11-digit number)

Additional Attributes Identified by Industry

- Timestamp to include milliseconds
- MPE ID
- ID Tag or FICS ID Tag
- WFOVSeqNumber or MailpieceID or PkgID or EventNum, etc.

Additional Attributes for Consideration

- IMb Routing Code
- MPESortPlanName
- Bin or ActualPocket or PocketNum

Data Access Authorization and Data Delegation

**Informed Visibility
for Mailers**

Data Access Authorization and Data Delegation

As-Is	Ability to view/receive handling events				Ability to delegate access to another			
	Container	Handling Unit	Bundle	Piece	Container	Handling Unit	Bundle	Piece
Inherent access								
Mail Owner	Yes ¹	Yes ¹	No	No	Yes	Yes	No	No
Mail Preparer	Yes ¹	Yes ¹	No	No	Yes	Yes	No	No
MID embedded in barcode	No	No	Yes	Yes	No	No	Yes ³	Yes ³
Delegated access								
Mail Owner's Delegate	Yes ²	Yes ²	No	No	No	No	No	No
Mail Preparer's Delegate	Yes ²	Yes ²	No	No	No	No	No	No

To Be	Ability to view/receive handling events				Ability to delegate access to another			
	Container	Handling Unit	Bundle	Piece	Container	Handling Unit	Bundle	Piece
Inherent access								
Mail Owner	Yes	Yes	TBD ⁴	TBD ⁴	Yes	Yes	TBD ⁴	TBD ⁴
Mail Preparer	Yes	Yes	TBD ⁴	TBD ⁴	Yes	Yes	TBD ⁴	TBD ⁴
MID embedded in barcode	TBD ⁴	TBD ⁴	Yes	Yes	TBD ⁴	TBD ⁴	Yes	Yes
Other entities? e.g. Scheduler ID CRID	TBD ⁴	TBD ⁴	TBD ⁴	TBD ⁴	No	No	No	No
Delegated access								
Any person/company delegated access	Yes	Yes	Yes	Yes	No	No	No	No

Legend

No = User will not have permission

Yes = User has or will have access by default, according to existing business rules

¹Yes = have access by default, but not if access is delegated to another

²Yes = have access if delegated by Owner/Preparer

³Yes = can provide data to another if added to subscription

⁴TBD = Do we want to extend data access through IV to include this permission?

☐ **Manage data delegations in IV**

- Authorize other users/companies to have access to your data
- Set up parameters: delegate by MID, serial number range, handling event type, USPS facility, mail object type (container, handling unit, etc.), effective dates, etc.
- View to whom you have delegated access
- Receive requests from users/companies requesting data access

☐ **Request data access**

- Send request to user/company requesting data access
- Indicate requested delegation parameters and note/reason for request
- View to whom you have sent data access requests, and status of request
- Ability to cancel request, if not already approved or rejected

☐ **Delegate**

- Receive notification when delegation permissions change
- View data that has been delegated to you/your company
- Any need for a users to be able to “reject delegation” or send delegator a message, other than requesting new data access?

Information Gaps IV can help fill

**Informed Visibility
for Mailers**

- ☐ At the 7/1 meeting, we mentioned that there are some unique aggregate views that can be supplied by IV that mailers don't currently have access to.
- ☐ For example, this information could be used to enhance the IMb Planning Tool.
- ☐ One suggestion was to show the % of that mailer's mail against what other mail the facility has on hand (i.e. total mail inventory on hand, by location, by scheme, etc. for planning purposes).
- ☐ Prompting Questions, for today's discussion:
 - List the focus areas for which IV can help fill information gaps.
 - What is useful to the industry for planning purposes?
 - What are the types of dashboards and reports that mailers want to see?

Updated UG4 Charter

MTAC User Group – Annual Review - August 13, 2015 Meeting

The MTAC Executive Committee, per the MTAC Charter, is responsible for approving the formation and conclusion of MTAC User Groups. To aid in that effort, the MTAC Executive Committee is conducting annual reviews of User Group issue statements.

MTAC User Group 4	
User Group Title	IMb Tracing/Informed Visibility
User Group Originator	David Robinson (WG 130)
Originator Association	Association For Postal Commerce
USPS Sponsor	Robert Cintron
Leadership Committee Sponsor	Lisa Bowes
User Group Mission Statement	To provide an ongoing forum for collaboration between the Postal Service and Industry to facilitate the use and, enhance value of Informed Visibility. By identifying, addressing and resolving issues as they arise, we hope to continue to add value to the mail. The scope of this group will include the development and implementation of the data framework for Informed Visibility, including education and development of related materials, so all may better understand and appreciate the power of business intelligence
Impact on Other Issues or Procedures	<ul style="list-style-type: none">• IMB Full Service offering• Service Measurement• Compliance• Reporting• Data Distribution• Incentives

MTAC UG4 Charter (Cont'd)

Desired Results	<ul style="list-style-type: none">• A collaborative effort between industry users of Intelligent Mail and USPS representatives interested in getting the most value and usage of mail visibility.• Address and resolve issues for the industry as they arise.
Initially Formed Date	Sep-10
Meeting Frequency	Weekly
Industry Leaders	Angelo Anagnostopoulos, Judy Kalus
USPS Leaders	Steve Dearing / Himesh Patel
Leadership Rotation Schedule	Two industry co-chairs, biannual rotation review as needed.

Recommendations

- Changed USPS Sponsor to Robert Cintron
- Changed Leadership Committee Sponsor to Lisa Bowes
- Updated Mission Statement
- Updated Desired Results
- Updated Meeting Frequency
- Updated Leadership Rotation Schedule

Any Other Business

Appendix

Informed Visibility for Mailers

7/1 Slides

**Informed Visibility
for Mailers**

- **Mailer Dashboard**

- Real-time dashboard showing status of mailings.
- Drill down to specific containers, handling units, etc. to explore the mailing.
- Drill down to specific entry locations, destination facilities, etc.
- View by mail class, mail shape, presort level, etc.
- View service score associated with mailings.

- **Troubleshooting and Data Quality**
 - *USPS Troubleshooting capabilities*
 - Helpdesk personnel can see same scan data available to mailers
 - Adequate tools for helpdesk to troubleshoot and resolve issues
 - Easily be able to see (or receive) scan data for a given MID
 - *Data Quality*
 - *Provides USPS Operations with tools to identify and resolve lack of or latent scan data*

- **Education and Documentation**
 - *Documentation*
 - Complete and up-to-date End User documentation
 - Webinars, videos, and other communications

- **Data Provisioning File Formats (push/pull data feeds)**
 - Mail.XML
 - Flat Files: Delimited or Fixed Width
 - XLS, XLSX

- **Data Reporting File Formats (online downloads)**
 - Flat Files: Delimited or Fixed Width
 - XLS, XLSX
 - PDF
 - HTML
 - DOC, DOCX
 - RTF
 - TXT

6/24 Slides

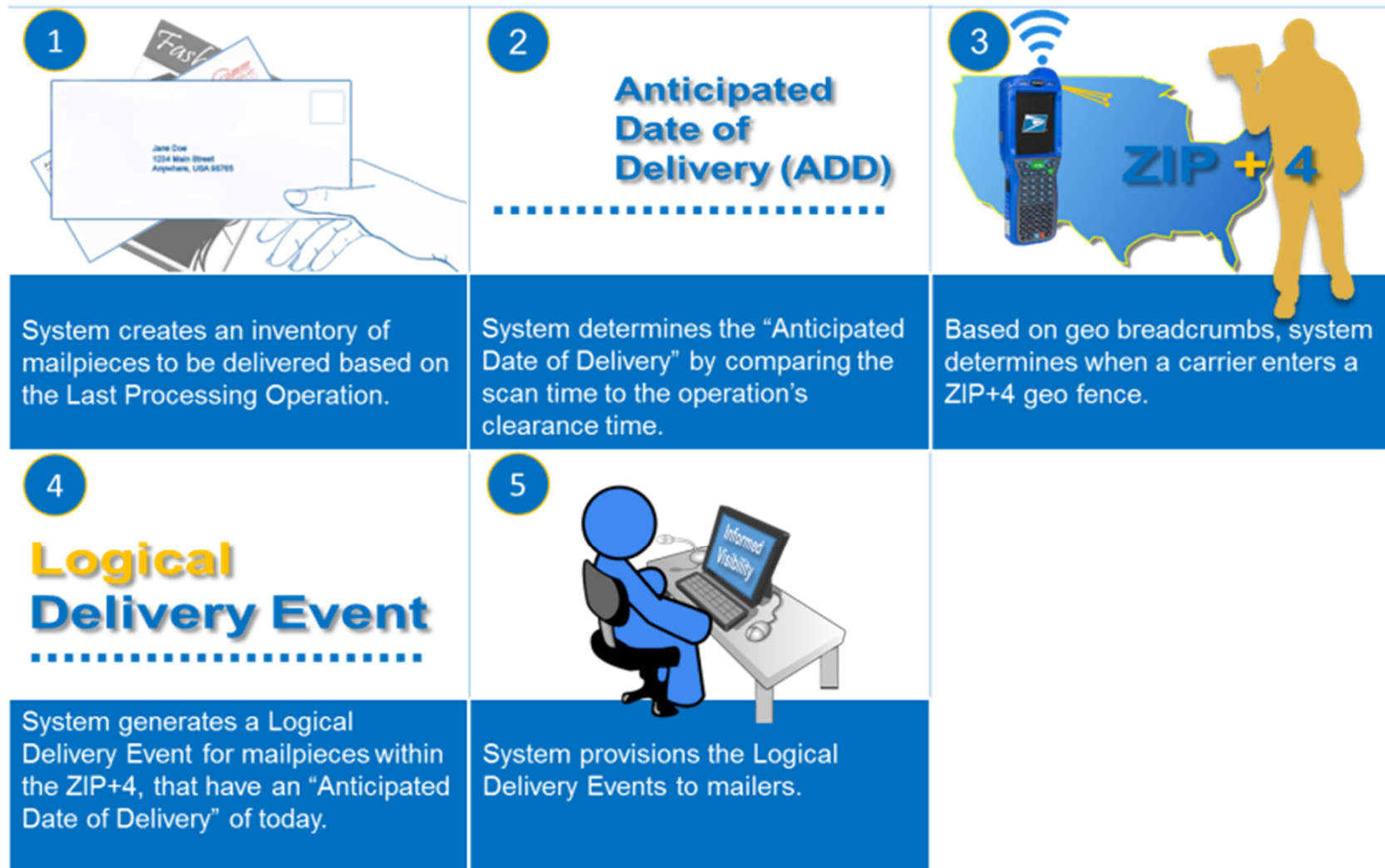
**Informed Visibility
for Mailers**

- **Mail objects available through End-to-End Mail Tracking**
 - Container
 - Handling Unit (Trays, Tubs, and Sacks)
 - Bundle
 - Piece
- **Visibility Events**
 - **Actual vs. Assumed vs. Logical Handling Events**
 - **Actual** = scan of physical mailpiece, bundle, handling unit, or container
 - **Assumed** = implied scan of nested mailpiece, bundle, handling unit, or container (i.e. The mail aggregate received an actual scan, and the nested mail receives an assumed scan)
 - **Logical** = any other implied event based on business rules.
For example: Logical Delivery Event (*see next slide for description*)

Mail Tracking & Data Provisioning

For discussion purposes only.

Logical Delivery Events



- **Tentative Implementation Roadmap**
 - Establish initial External Data Provisioning Mechanism (**Push to Secure FTP Server**)
 - Pilot then national rollout of: **Logical Delivery Events**
 - Pilot then fully migrate: **Piece visibility** and IMb Tracing subscriptions
 - Develop and implement: **IV User Interface** to Query and Pull Reports
 - Enhance External Data Provisioning Mechanism (to support **Mail.XML Push and Pull reports**)
 - Pilot then fully migrate: **Container and Tray visibility**
 - Pilot then fully migrate: **Bundle visibility**
 - Develop and implement: **Assumed handling events**
 - Identify other opportunities for creating **Logical handling events**
 - Develop and implement: **Flexible Data Delegation through IV**

- **Data Format**

- Customizable data feeds: “What you want, when you want it, and how you want it”
- Fields/data elements
- File Format (XML, flat-file, etc.)

- **Data Distribution/Provisioning**

- Push methods (Mail.XML push subscription; Secure FTP push; etc.)
- Pull methods (Mail.XML pull requests; etc.)
- Frequency of Data Feed
 - Real-time, Hourly, Every X hours, Daily, etc.
- Configurable (by MID, mail object type, handling event type, etc.)

- **Data Timeliness**

- Mailpieces, bundles, handling units, and containers are scanned and sent to IV in near real-time to be provisioned
 - What is the preferred timeliness (e.g. within 30 minutes of scan)?

- **Data Access Authorization**

- How recipient of scan data is determined
 - MID embedded in barcode
 - By/For of eDoc
 - Expand current business rules? For example:
 - Expanding Piece Visibility to use By/For, in addition to MID embedded in barcode?
 - Expanding Container and Tray Visibility to use MID embedded in barcode, in addition to By/For from eDoc?

- **Data Delegation**

- Mail Owner/Preparer can authorize other users/companies to have access to their data, and, those users/companies in turn, can set up their own data feeds
 - Data delegation process through IV
 - Flexible – delegate by MID, serial number range, etc.
 - Not limited

6/10 Slides

**Informed Visibility
for Mailers**

- **Provide review of IV™ mail tracking and data provisioning.**
- **Discussion topic for next few UG4 meetings:**
 - **6/24:** Data elements for container, handling unit, bundle and piece
 - **7/8:** Data provisioning (format, method, frequency)
 - **7/22:** Data delegation

Enhanced Visibility



Current

IMb Tracing®

- Visibility for letters, flats & bundles
- Bundle visibility limited to piece automation scans
- Raw data download, or push subscription (1-24 hour)

PostalOne! & Mail.xml

- Visibility for trays & containers
- Push, pull, or download data
- Latency issues

Future



- Comprehensive end-to-end
- Real-time reporting
- Flexible data provisioning
- Customer specific mail performance
- Additional scan events
 - Delivery unit related bundle visibility
 - "Out for delivery" & "delivered" events

